



May 2017

FEATURE

Fuel for Thought

A 2016 AAA report concludes that TOP TIER™ gasoline is a preferable fuel for motorists. Is it right for your station?

BY JERRY SOVERINSKY

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As part of its ongoing effort to provide relevant driving information for its members and the general driving population, AAA conducts research on a variety of topics—everything from the preferable locations for spare tires to autonomous vehicle testing. Funding for such research is raised internally without outside influence, lending credibility to its findings, which often generate significant industry attention.

And so it was little surprise last July when AAA released “AAA Fuel Quality Research: Proprietary Research Into the Effectiveness of Fuel Additive Packages in Commercially Available Gasoline,” a report that tied a substantial performance and efficiency boost to TOP TIER™ gasolines, that retailers began taking the proprietary additive seriously.

“AAA was surprised to learn the extent to which detergent additives impact gasoline quality,” said John Nielsen, AAA’s managing director of automotive engineering and repair. “As advertised, tested TOP TIER gasolines kept engines remarkably cleaner than other fuels we tested.”

How much cleaner? According to the AAA report, using a TOP TIER gasoline results in 19 times fewer engine deposits, a reduction that correlates with increased fuel economy, increased vehicle performance and lower emissions. Its advantages are often summed up by referencing the status quo (non TOP TIER): According to AAA, long-term use of non-TOP TIER fuel reduces fuel economy by up to 4% while increasing emissions.

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On the heels of the AAA report as the number of certified TOP TIER retailers slowly increases, the question of whether to offer TOP TIER has become more prominent. Is the additive right for the fuels you sell? Let's take a closer look.

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In the mid-2000s, several auto companies concluded that existing fuel detergents were insufficient. TOP TIER became that better and cleaner burning fuel to reduce deposit.”

WHAT IS TOP TIER

TOP TIER is not premium gasoline, it's an additive package. “Years ago, there were a lot of concerns that the detergents added to our gasoline were not providing enough cleaning power and performance enhancements to our engines,” said John Eichberger, executive director of the Fuels Institute. “As a result, in 1996, the EPA established the lowest additive concentrate (LAC) package, which became the standard across the country”—standards that remain in place today.

By the mid 2000s, several auto companies, in response to gunk buildup on their valves, concluded that the existing detergents were insufficient. “They needed a better and cleaner burning fuel to reduce deposit buildups,” Eichberger said. “And so they came up with a higher additive package that they called TOP Tier.”

“It was an issue of improving the vehicle ownership experience,”

explained a spokesperson for the Center for Quality Assurance (CQA), which runs the TOP TIER program. “Replacing a catalytic converter, that's \$1,000. And if you have to tear the engine apart, that's expensive, too.”

TOP TIER launched in April 2004 with four auto company sponsors (GM, Honda, Toyota, BMW) and has since added Fiat Chrysler, Mercedes-Benz, Volkswagen and Audi. Consumer awareness has been slow to gain traction, as there has been a relatively minor marketing and PR push accompanying the additive (the CQA lists Motor Trend and Wikipedia articles in 2014 as two of the more prominent traffic drivers to TOP TIER stations). It wasn't until the AAA report last year that awareness really spiked and began influencing motorists in a measurable way.

“We've seen some changing consumer buying behavior because of our research, as well as a growth in the number of TOP TIER retailers,” said Greg Brannon, AAA's director of Automotive Engineering. “Definitely seen a shift in consumer buying behavior.”

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THE PROCESS

To purchase the TOP TIER additive package and sell to the public, a retailer must get certified. It's a relatively pain-free, four-step process that TOP TIER lays out as follows:

1. The retailer contacts the program administrator (CQA), who explains the obligations and commitments involved with enrollment. The licensing agreement stipulates that the retailer must maintain the TOP TIER treat rate in all octane grades at all of its locations.
2. The retailer contacts their fuel supplier (terminal, distributor, jobber, etc.).
3. The retailer prepares promotional items, which includes stickers and signage.
4. TOP TIER then loads their station details into its station finder app.

After that, they're good-to-go, according to TOP TIER.

You'll pay a licensing fee, which is a reflection of how many stores sell TOP TIER. However, there is flexibility on the cost, according to TOP TIER. "The great thing about TOP TIER performance standards is that there are roughly five to seven different additives that the retailer can buy. The [variety] helps reduce its cost, as they can shop around for the additive."

The ease of the certification process, along with the quality of the TOP TIER additive, have been major selling points for retailers.

According to details released from an 2016 Fuels Institute Spring meeting, at that time 32 U.S. retailers offered TOP TIER gasoline, representing 35% of retail stations and a 65% market share of U.S. and Canadian gasoline volume. It's sizable growth, yet TOP TIER acknowledges there is still much to do in terms of generating consumer education and gaining retailer locations.

MARKETING ABCS

The majority of retailer-based marketing efforts for TOP TIER have been meager. Most focus on dispenser stickers, which are easily obscured on a dispenser that is cluttered with pump television, foodservice promotions and car wash coupons.

Recent efforts are more promising, as TOP TIER has been working with GasBuddy to provide search filters based on TOP TIER stations. Already, the inclusion on the popular app has increased traffic to www.toptiergas.com (<http://www.toptiergas.com>) by more than 1,000%, according to the CQA.

Additionally, the automakers are making a concerted effort to build awareness across various consumer touchpoints, including car owner manuals, auto dealerships and trade shows. But ultimately, they know that the success of the program depends on retailer buy-in.

"The best awareness is really created by the promotions and marketing initiatives sponsored by the c-store owners and fuel retailers," TOP TIER reported, mentioning various proactive marketing efforts that have successfully raised consumer awareness: "Many retailers have pump toppers promoting TOP TIER, another placed a billboard along a major

highway with the TOP TIER logo, and one company was evaluating the possibility of putting TOP TIER on the marquee signs out by the road [in front of its station].”

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There’s work to be done. According to the AAA in its TOP TIER report, while 63% of U.S. drivers believe that there exists a difference between the quality of gasoline sold at different gas stations, only 12% of motorists choose a gas station based on fuel quality. For that, TOP TIER is turning to retailers to help spread the word.

WHY NACS?

But if TOP TIER delivers such impressive fuel performance and efficiency benefits, why didn’t it simply go to the EPA and have them mandate it? “It’s difficult to get the government to issue a new rule; that would take at least five years,” Eichberger said.

Brannon said it’s that time delay that presents possible conflicts with technology. “The issue with trying to create a policy around fuel detergent is that the engine design is changing so rapidly,” he said. “By the time the regulations would catch up, it would be outdated. So the industry is letting retailers drive the change.”

As a result, don’t be surprised if you see fresh faces from the automotive industry at NACS and SIGMA events. “They are networking with retailers and promoting TOP TIER,” Eichberger said. “They want to create a competitive compulsion for others to hop on. They believe that’s more efficient than going to the EPA.”

GEO-CONCERNS

As you assess the value of TOP TIER at your station, be sure to consider regional fuel standards, said Tom Robinson, owner of 34 Bay Area-based Rotten Robbie convenience stores. With fuel quality standards in California the highest in the United States, he wanted to know how TOP TIER compared—and whether it offered any incremental benefits.

“California has the highest and most stringent gasoline detergent standards in the world; it required the addition of more detergents in gasoline a while ago. Based on my understanding, California and CARB (California Reformulated Gasoline Program) raised the standards to maximize vehicle performance and lower emissions.”

So does TOP TIER offer his California customers an even greater performance and efficiency boost? Robinson said he was unable to find a definitive answer that persuaded him to invest in the additive. “In the future, we may choose to do so from a marketing standpoint, but so far we’ve resisted it.”

LOOKING AHEAD

As for whether the future is looking up for TOP TIER, Eichberger provides an unequivocal maybe. “Market growth will be slow but they’ve signed on some big names as well as the automakers. That’s providing some good momentum. But ultimately, it will come down to consumer adoption,” Eichberger said. “It appears that TOP TIER makes a difference in the cleanliness of valves and injectors. But there’s far less clarity that the consumer actually cares. And if the consumer doesn’t care, there’s much less of an incentive for retailers [to get on board].”

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ABOUT JERRY SOVERINSKY

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